



Case – Individual Info

MH Residential Job Aid

The *Individual Info* screen contains basic demographic information on the Consumer (client) as well as Sexual Orientation and Gender Identity Expression (SOGIE) information and address(es). Representative payee, guardianship and power of attorney information is also captured here. Information entered in the Referral will carry over into the Case.

Individual Info

Referral Summary

*Denotes Required Fields **Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

Referral Date *	Referral Status *	Referral ID	Priority Category *
<input type="text"/>	Pending	0	None selected
Provider	Facility/Unit	Assigned Worker	Readiness Level *
<input type="text"/>	<input type="text"/>	<input type="text"/>	-Select-

Diagnostic Information: The applicant must have a primary diagnosis of a Serious Mental Illness other than primary alcohol or substance use disorders, organic brain syndromes, developmental disabilities, or social conditions within the past 12 months.

Readiness Date	Primary Mental Health Diagnosis *	Secondary Mental Health Diagnosis	Diagnosis Date *
<input type="text"/>	-Select-	<input type="text"/>	<input type="text"/>
Level Of Care *			
Level of Care Descriptions		-Select-	

[Print Referral Summary](#)

Individual Information *

Sexual Orientation and Gender Identity Expression *

Address information *

Representative Payee, Guardianship and Power of Attorney Information *

[Save](#)
[Next](#)

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus; the **Summary** tile will open automatically.
- From within the Case: Click on the **Case Information** tile. Then click on the **Individual Info** tile.

Individual Information

- ▼ Individual Information : This pane contains basic demographic information for the Consumer. If the Consumer has already been entered, clicking on the Consumer’s first name will open the *Consumer Information - Details* pop-up.

- Viewing or editing Individual Information: Click the Edit Icon [] to the right of the Consumer in the *Individual Information* grid. This will open the *Individual Details* pop-up.
- Clicking on the MCI ID for an individual will open Client View and display the individual’s information in Client View.

2. Editing the *Individual Details* pop-up:

- Prefix, First Name, Middle Name, Last Name* and *Suffix*: Enter the Consumer’s *First Name* and *Last Name*. If applicable also enter the Consumer’s *Prefix, Middle Name, and Suffix*.
- SSN*: Enter the Consumer’s Social Security Number (SSN).
- Birth Date*: Enter the Consumer’s date of birth.
- Legal Sex*: Select the Consumer’s legal sex from the drop-down.



- e. *Race*: This is a multi-select drop-down, select all that apply.
- f. *Source of Income*: This is a multi-select drop-down, select all that apply.
- g. *Health Insurance and Other Health Insurance Type*: Select all of the types of health insurance that the Consumer currently has. If "Other – Please Specify" is selected, enter the specific *Other Health Insurance Type*.
- h. *Applying for benefits through SOAR?*: Indicate whether or not the Consumer is applying for benefits through SOAR by selecting "Yes" or "No" from the drop-down.
- i. *Veteran?*: Indicate whether or not the Consumer is a veteran by selecting "Yes" or "No" from the drop-down. "Unknown" is also an option.
- j. Click  to save the information that was entered and close the pop-up. Clicking  will close the pop-up without saving any of the information entered.

SOGIE (Sexual Orientation and Gender Identity Expression)

1.  : In this pane update or document the Sexual Orientation and Gender Identity Expression (SOGIE) information for the Consumer.

Sexual Orientation and Gender Identity Expression *

Did Not Ask Yet **A**

Legal and Preferred Name/Pronouns same? **B**

Preferred Name * **C** Gender Identity * **D** Self Describe Legal Name-Gender Pronouns * **E** Self Describe

Preferred Name-Gender Pronouns * **F** Self Describe Sex Assigned At Birth **G** Sexual Orientation **H** Self Describe

- a. If you have not yet asked about the Consumer’s SOGIE information, check the *Did Not Ask Yet* box. Doing so will cause the rest of the SOGIE fields to become read only. When you are ready to document this information you can uncheck the *Did Not Ask Yet* checkbox and all of the SOGIE fields will be enabled again.
- b. If the Consumer has indicated that their preferred first name and Pronouns are the same as their Legal Name and Pronouns check the *Legal and Preferred Name/Pronouns same?* Checkbox. Checking this box will update the *Preferred Name* field with the Consumer’s first name as it appears in the *Individual Information* grid.



- c. *Preferred Name*: Enter the Consumer's preferred name here.
- d. *Gender Identity*: Select the Gender Identity that the Consumer identifies as from the drop-down. If their Gender Identity is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Gender Identity here.
- e. *Legal Name-Gender Pronouns*: Select the Consumer's Legal Gender Pronouns from the drop-down. If their Legal Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Legal Gender Pronouns here.
- f. *Preferred Name-Gender Pronouns*: Select the Consumer's Preferred Gender Pronouns from the drop-down. If their Preferred Gender Pronouns are not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Preferred Gender Pronouns here.
- g. *Sex Assigned at Birth*: Select the Consumer's sex assigned at birth from the drop-down.
- h. *Sexual Orientation*: Select the Consumer's Sexual Orientation Sexual Orientation from the drop-down. If their Sexual Orientation is not one of the options listed, select "Self Describe". This will cause the *Self Describe* field to the right to open; enter the individual's Sexual Orientation here.

Address Information

1. ▼ Address Information :

▼ Address Information *

Address Type	Address Summary	Primary Address	Validated?	
Home	123 N Main St Sharpsburg Borough Pittsburgh, PA, 15215-2018	Yes	Yes	✔ 🗑️

Show 10 entries First Previous 1 Next Last

Address Type * A

-Select- ▼ Program Type ▼

-Select- ▼ -Select- ▼

Address 1 * B **Address 2** **Primary Address** C **County** D

 -Select- ▼ Allegheny ▼

City E **Neighborhood/Municipality** F **State *** G **Zip Code** H **Extension**

 -Select- ▼ Pennsylvania ▼

New Save & Validate

- a. *Address Type* and *Program Type*: Select the type of address being documented from the *Address Type* drop-down. If the address type is part of a program then select the type of program from the *Program Type* drop-down.
- b. *Address 1* and *Address 2*: Enter the Address line 1 and Address Line 2 (if applicable).
- c. *Primary Address*: Select "Yes" or "No" from the drop-down. Only one active address can be the Primary Address at a time.
- d. *County*: Select the County from the drop-down. This drop-down will default to "Allegheny".
- e. *City*: Enter the City.
- f. *Neighborhood/Municipality*: If known, select the Neighborhood/Municipality from the drop-down.
- g. *State*: Select the State from the drop-down. This drop-down will default to "Pennsylvania".
- h. *Zip Code* and *Extension*: Enter the Zip Code and Extension (if known).



2. Saving and Validating the address: When an address is validated, Synergy compares the entered information to the postal code address list and generates a list of possible addresses formatted properly.
 - a. Click **Save & Validate** to open the *Address Validation* pop-up. The *Search Result* grid will already be populated with the possible search results.

Address Validation

Address Information

Address Type	Program Type	Address 1	Address 2	City
Home	--Select--	123 N Main St		Pittsburgh
County	Neighborhood/Municipality	State	Zip Code	Extension
Allegheny	Sharpsburg Borough	Pennsylvania	15215	2018

Search

Search Result

Address Line 1	Address Line 2	Municipality	City	State	Zip Code
123 N Main St		Sharpsburg Borough	Pittsburgh	PA	15215-2018

Select **Cancel** **Create address as entered**

- i. If the *Search Result* list includes the desired address, click on the correct address in the grid and click **Select**. The *Address Validation* pop-up will close and the selected address will appear in the *Address* grid with a "Yes" in the *Validated?* column to indicate that the Address has been validated and a will appear to the right of the address in the grid.
- ii. If the correct address is not in the *Search Result* list, the *Address Information* can be updated and searched again. To do so, edit the *Address Information* and click **Search**.
- iii. If, after searching again, the address cannot be located in the *Search Result* list the address can still be saved without validation. To do so, click **Create address as entered**. The *Address Validation* pop-up will close and the address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated and a will appear to the right of the address in the grid.
- iv. Clicking **Cancel** will close the *Validate Address* pop-up without validating or changing any information.

Tip: If the person is homeless, select "Homeless" from the Address Type drop-down and click Save and Validate to add "Homeless" to the Address grid.

3. Editing, Validating, or Deleting an Address:

Address Type	Address Summary	Primary Address	Validated?	
Home	123 N Main St Sharpsburg Borough Pittsburgh,PA, 15215-2018	Yes	Yes	 

Show entries First Previous 1 Next Last

- To edit an address that has already been entered in the *Address* grid click on the address in the *Address* grid, update the information below the *Address* grid and click . The *Validate Address* pop-up will then open to allow the edited information to be searched and validated again.
- To run the validation search on an address in the grid, click on the  (for addresses that have not already been validated) or the  (for addresses that have already been validated). This will open the *Address Validation* pop-up.
- To delete an address, click the Delete Icon [] to the right of the address in the *Address* grid. A *Confirm Delete* pop-up will appear:

Confirm Delete

Clicking on "Yes" button will delete this record.
Would you like to proceed?

Clicking  will delete the address.

Clicking  will cancel the action and the address will not be deleted.

- To add another address, click the  button at the bottom of the tab.

Representative Payee, Guardianship and Power of Attorney Information

1. **Representative Payee, Guardianship and Power of Attorney Information** :

Representative Payee, Guardianship and Power of Attorney Information *

Does the applicant have a:

A

Representative Payee? *	Name/Agency Name *	Phone # *	Address *
-Select- <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

B

Guardian? *	Name/Agency Name *	Phone # *	Address *
-Select- <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Guardian Type? *			
-Select- <input type="checkbox"/>			

C

Power of Attorney? *	Power of Attorney Type *	If yes, specify: *
-Select- <input type="checkbox"/>	-Select- <input type="checkbox"/>	<input type="text"/>

- a. **Representative Payee?**: Indicate whether or not the Consumer has a Representative Payee by selecting "Yes" or "No" from the drop-down. If "Yes" is selected:
- Name/Agency Name**: Enter the name of the individual/agency who is the Representative Payee.
 - Phone #**: Enter the phone number of the Representative Payee.
 - Address**: Enter the address of the Representative Payee.
- b. **Guardian?**: Indicate whether or not the Consumer has a guardian by selecting "Yes" or "No" from the drop-down. If "Yes" is selected:
- Guardian Type?**: Select the type of guardian from the drop-down.
 - Name/Agency Name**: Enter the name of the individual/agency who is the guardian.
 - Phone #**: Enter the phone number of the guardian.
 - Address**: Enter the address of the guardian.



- c. *Power of Attorney?*: Indicate whether or not the Consumer has a Power of Attorney by selecting "Yes" or "No" from the drop-down. If "Yes" is selected:
 - i. *Power of Attorney Type?*: Select the type of guardian from the drop-down.
 - ii. *If yes, specify*: Enter the name/contact information of the Power of Attorney.

2. Click  at the bottom of the screen before navigating away from the  screen otherwise any information that has been entered or updated will not be saved. The screen cannot be saved unless all of the mandatory [*] information has been entered.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm> or <http://dhsassist.dhs.allegheny.local> for internal users.